

From: [Willcox, Alice](#)  
To: [Katrina Higgins-Coltrain](#)  
Subject: RE: [External] FW: Wilcox Primavera  
Date: Monday, August 24, 2015 9:25:18 AM  
Attachments: [0004942.pdf](#)  
[0004942.pdf](#)  
[0004942.pdf](#)  
[0004942.pdf](#)  
[0004942.pdf](#)  
[0004942.pdf](#)

Unfortunately, the fix that Booz-Allen tried last week did not work. So, Carlene and I have asked to see what record that the SEMS Team was seeing that we could not see and that they said was part of the Business Rules stating the record should not be deleted. Carlene viewed the record and determined that the RI Activity should definitely be deleted and I have another ticked in with the SEMS Team to remove this record as this is not a Valid entry. I entered this ticked with the SEMS Reference Desk this past Friday and I am waiting to see if the entry can be done through a database revision as requested by Carlene.

If the Help Desk still refuses to delete this record after Carlene who is the Budget Coordinator has requested it, I will have to take it up with the OSRT Managers over SEMS and the Budget Section.

Here is what I entered in the request:

SEMS-RE-0003 - SEM Lotus Notes

File Edit View Create Actions Text Tools Help

Base Close Print View Request Details

Entered By: Alice Holler Telephone:   
Date Entered: 08/20/2015 03:07 PM

**Provide a complete description for the defect, enhancement or question/comment.**

On 8/20/2015 I entered a SEMS User Request entitled "Wilcox Of RE-0055. The RPM has stated that management has requested that the RI 001 Activity be deleted from Site Management because the Activity was probably entered at some point historically by another RPM at the site in error. The RPM states that the RI Activity never occurred and should not be listed in the Wilcox OR Site. The SEMS Team stated on 8/22/15 that they checked the Action Table and the Activity has been flagged as one of the Activities that cannot be deleted because their data associated to it. The SEMS Team said that they saw a financial transaction for planning/testing or an associated financial other than a Planned Obligation. We checked the site in the Primavera Planning Table and there did seem to be a financial transaction existing at the CERCLUS Regulated RI Activity ID#1. Activity ID 550567 Gov't RI Work Package, but when we checked the Published Table for the site, the Gov't RI Work Package, the RI Activity and any associated financial transactions no longer existed. Carlene Chambers, the Contracts and Budget Section Chief and the Budget Coordinator for Region 6, checked Compass and she stated she did not see any financial transactions associated to the RI Activity for Wilcox OR. Carlene Chambers has asked if you could pull what is in the Action Table and provide us with the data. She stated that if it could actually see what the SEMS Team is seeing she would be in a better position to say whether or not those transactions are valid and had been obligated or expended. Also, if those transactions are not valid, in the past the Region was able to remove records like the RI Activity in question from CERCLUS through a database revision. If those transactions are indeed not valid, can we have the record deleted from SEMS through a database revision as requested by the RPM and RE Management?

**Provide additional information if applicable.**

User Access Role: ☒ Remedial Project Manager (RPM)\_MS  
Site Name: ☒ Wilcox OR  
SEMS Instance: ☒ Production ☐ Staging

Site	Action	Sequence	Deletion disallowed?	Financial Transaction Type Code	Amount	Budget FY	Transaction Date	Comment Text	Budget Organization Code	Program Result Code
0604942	REMEDIAL INVESTIGATION		Cannot delete because the record has either document or document collection, or financial actuals, or target details with actual date(s) 1 associated with it.	F	750000	2015	30-Jan-15 RI if no PRPs	Planning fund	6A00P	303002

Attachments: 0004942

Here is what was transpired between the SEMS Team, Carlene and me on Friday.

SEMS-RE-0003 - SEM Lotus Notes

File Edit View Create Actions Text Tools Help

Base Close Print View Request Details

Cannot delete because the record has either document or document collection, or financial actuals, or target details with actual date(s) 1 associated with it.

Attachments: 0604942 REMEDIAL INVESTIGATION

**Close Request**

**Discussion**

08/21/2015 1:29:56 PM - ALICE HOLLER  
Hello, Carlene Chambers says that the record is not an actual obligation, the record is not in Compass and the record should be deleted. Please find a way to delete this record from SEMS. This is not a valid record or SEMS Activity. Here is Carlene's email reply:  
Since we are doing an RI/FS instead of an RI, that does need to come out somehow.  
Carlene Chambers, Chief  
Superior Contracts and Budget Section  
Region 6, Dallas TX  
214-665-1111  
08/21/2015 9:30:07 AM - SHAROLA SHAWOR  
Alice - please check the information above and please let us know if you are looking for any additional information to help identify this transaction, and we can see what is available. The transaction appears to have been added in October 2013. If this is not a valid transaction, we can use the 550567 item if it is possible to remove it.  
☐ Regional Response Completed (check this when responding back to the contractor team)

**Regional Review**  
**Contractor Tracking**  
**Subject Area Workgroup Review**

From: Coltrain, Katrina  
Sent: Monday, August 24, 2015 8:45 AM  
To: Holler, Alice  
Subject: RE: [External] FW: Wilcox Primavera

Alice, do you know if the Wilcox fix was successful?

Katrina Higgins-Coltrain  
Remedial Project Manager  
US EPA Region 6  
LAW/ONM Section  
1445 Ross Avenue  
Dallas, Texas 75202  
214-665-8143

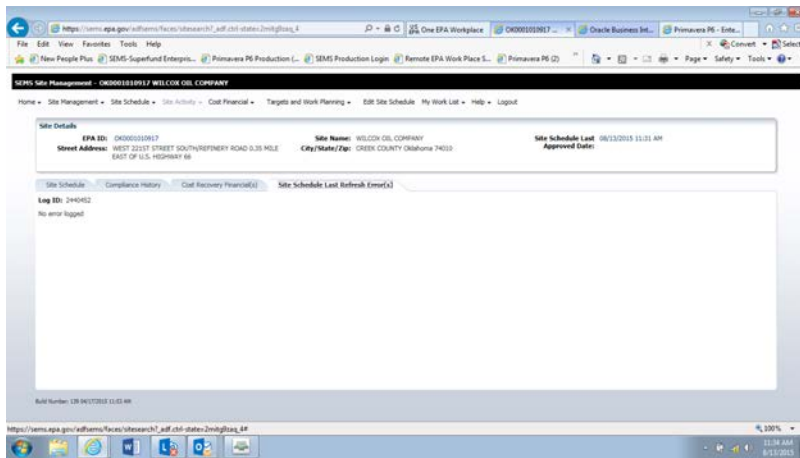
From: Holler, Alice  
Sent: Thursday, August 13, 2015 11:44 AM  
To: Coltrain, Katrina  
Subject: FW: [External] FW: Wilcox Primavera

Katrina - FYI, I forwarded this to the contractor and asked them to try to delete the RI Activity from SEMS as we originally tried last week.

Alice

From: Holler, Alice  
Sent: Thursday, August 13, 2015 11:36 AM  
To: Coltrain, Katrina  
Cc: Sanchez, Carlos  
Subject: RE: [External] FW: Wilcox Primavera

I republished it and so far there are no Site Schedule Refresh Errors.



From: Coltrina, Katrina  
Sent: Thursday, August 13, 2015 11:23 AM  
To: Hollier, Alice  
Subject: RE: [External] FW: Wilcox Primavera

Alice, the issue has been resolved by deleting the Activity. Can you republish or should I get Carlos to do it?  
thanks

Katrina Higgins-Coltrina  
Remedial Project Manager  
US EPA Region 6  
L.A. OK/NM Section  
1445 Ross Avenue  
Dallas, Texas 75202  
214-665-8183  
f t

From: Hollier, Alice  
Sent: Tuesday, August 11, 2015 2:51 PM  
To: Coltrina, Katrina  
Subject: FW: [External] FW: Wilcox Primavera  
Importance: High

Katrina:

Last Friday, Nelson Fox, a Booz Allen Hamilton Contractor, made an attempt to delete the RI Activity for Wilcox, but the procedure did not work. He mentioned in his reply to us that he noticed that Wilcox had a data error stating that there is an activity in the RD Work Package that is not a WBS Template Activity. Nelson suggested that this data error may be one of the problems preventing them from removing the RI Activity. I forwarded this error to the SEMS Reference Desk/Team and their reply is below highlighted in Bold, Yellow.

- Here is the statement request that I entered in SURS along with a screenshot of the Scheduling and Contracts Activity ID from Primavera.

Wilcox Oil Company has a Site Schedule Last Refresh Error stating there is an activity not from the template. It states that the Scheduling and Contracts Activity ID A411052, was not found in the database. The error goes further in stating that the activity may have been manually added to the schedule and was not added by using the Add WBS From Template function resulting in the error. How would the RPM correct this error? Screenshots of the error and activity are below. Thank You, Alice Hollier

Activity ID	Activity Status	Activity Type	Start	Finish	Planned Duration	Remaining Duration
A36700	Not Started	Task Dependent	06-13-17 08:00 AM	07-12-17 04:00 PM	30	
A48632	Not Started	Finish Milestone	07-12-17 04:00 PM	07-12-17 04:00 PM	0	
0604942-1.1.2.1.1.3 GOVT Decision Document (ROD) (site-wide)			07-13-17 08:00 AM	11-09-17 04:00 PM	120	1
Develop Draft ROD	Not Started	Task Dependent	07-13-17 08:00 AM	09-10-17 04:00 PM	60	
Review and Comment on Draft ROD	Not Started	Task Dependent	09-11-17 08:00 AM	10-10-17 04:00 PM	30	
Develop Final ROD	Not Started	Task Dependent	10-11-17 08:00 AM	11-09-17 04:00 PM	30	
Approve/Sign ROD	Not Started	Finish Milestone	11-09-17 04:00 PM	11-09-17 04:00 PM	0	
0604942-1.1.2.1.5 Perform Treatability Study (Optional)						
0604942-1.1.2.1.6 Pre-Design Assistance (Optional)						
0604942-1.1.2.1.7 Technical Assistance (Optional)						
0604942-1.1.2.1.8 Remedial Design			11-10-17 08:00 AM	02-16-19 04:00 PM	464	4
0604942-1.1.2.1.1 GOVT RD			11-10-17 08:00 AM	02-16-19 04:00 PM	464	4
0604942-1.1.2.1.1 GOVT RD (site-wide)			11-10-17 08:00 AM	02-16-19 04:00 PM	464	4
Scoping and Contracts	Not Started	Task Dependent	11-10-17 08:00 AM	03-09-18 04:00 PM	120	
GOVT RD Start - Obligation of Funds	Not Started	Start Milestone	03-10-18 08:00 AM	03-10-18 08:00 AM	0	
GOVT RD Start - In House (Memo to File)	Not Started	Start Milestone	03-10-18 08:00 AM	03-10-18 08:00 AM	0	
Perform Pre-design Studies	Not Started	Task Dependent	03-10-18 08:00 AM	07-07-18 04:00 PM	120	1
Develop Preliminary Design	Not Started	Task Dependent	04-09-18 08:00 AM	07-07-18 04:00 PM	90	
Perform Value Engineering	Not Started	Task Dependent	04-09-18 08:00 AM	07-07-18 04:00 PM	90	
EPA Reviews and Comments on Preliminary Design	Not Started	Task Dependent	07-08-18 08:00 AM	08-06-18 04:00 PM	30	
Prepare Prioritization Panel Briefing Package	Not Started	Task Dependent	08-07-18 08:00 AM	08-20-18 04:00 PM	14	
Present Site to Prioritization Panel	Not Started	Finish Milestone	08-20-18 04:00 PM	08-20-18 04:00 PM	0	
Negotiate Superfund State Contract	Not Started	Task Dependent	03-10-18 08:00 AM	09-05-18 04:00 PM	180	1
Superfund State Contract in Place	Not Started	Finish Milestone	09-05-18 04:00 PM	09-05-18 04:00 PM	0	
Develop Institutional Controls Plan	Not Started	Task Dependent	08-07-18 08:00 AM	10-05-18 04:00 PM	60	
Prepare and Submit Intermediate/Pre-final Design with review	Not Started	Task Dependent	05-21-18 08:00 AM	11-18-18 04:00 PM	90	
EPA Develops RD Reports	Not Started	Task Dependent	11-19-18 08:00 AM	12-18-18 04:00 PM	30	
Develop Final RD with review	Not Started	Task Dependent	12-19-18 08:00 AM	02-16-19 04:00 PM	60	

- Katrina - Here is the reply from the SEMS Team with their recommendation to resolving the issue reported above.

08/11/2015 1:02:39 PM: DIANLA SWAN  
The ACTIVITY FROM TEMPLATE error indicates that the "Scoping and Contracts" activity was manually added to the schedule by using the "Add Activity" feature instead of adding a work package in the Master Template using the "Add WBS from Template" feature. At this time, it is not recommended to add new activities that are not part of the Master Schedule Template. Since the "Scoping and Contracts" activity is not part of the Master Schedule Template, this activity will need to be deleted and the "GOVT RD Start - Obligation of Funds" and "GOVT RD Start - In House (Memo to File)" milestones assigned to a new predecessor.  
It looks like the user wanted the two RD Start milestones to start upon the finish of the predecessor "Scoping and Contracts" activity (15916). If this is still the case and they want to enforce this timeframe, they could build in lag time from the new predecessor activity (likely the "Approve/Sign ROD" activity) or add duration constraints to these milestones.

Thank You,  
Alice

From: Fox, Nelson [USA] [mailto:nfox@ba.com]  
Sent: Friday, August 07, 2015 2:36 PM  
To: Hollier, Alice; Lowe, Chip  
Cc: Wenograd, Bonnie [USA] [mailto:bonnie.wenograd@ba.com]; Coltrina, Katrina; Chambers, Carlene; Gee, Jo; Ragone, Derek  
Subject: RE: [External] FW: Wilcox Primavera

Alice,

We tried our process on Wilcox, but unfortunately this did not correct the RI from displaying in Site Management. Attached are detailed screenshots of our process and a quick summary below.

From our findings, we could not see anything but Planned Obligations for this activity. Without backend access to the system, we are unable to query the database to see the actual financial code issue.

We did notice, before we performed any work, that there was an error in the error log in Site Management. This error is still present in the error log in Site Management. The error states that there is an activity in the RD work package that is not a WBS Template activity. This error may be preventing the schedule from updating correctly in Site Management, as we have encountered other errors that have prevented the schedule from updating correctly until the problem has been fixed. You may want to follow up with the SEMS Reference Desk about this error.

To Summarize:

1. Copied the RI work package (including planned obs), published > work package and planned obs showing in Site Management
2. Deleted the planned obs, published > planned obs no longer showing in Site Management
3. Deleted the work package, published > RI work package is still showing in Site Management

Please let me know if you have any questions.

Thanks!

*Nelson D. Fox Jr*

Booz | Allen | Hamilton

Nelson Fox  
Associate  
Office 703.377.2607  
fox\_nelson@bah.com

From: Hollier, Alice [<mailto:Alice.Hollier@BoozAllen.com>]

Sent: Friday, August 07, 2015 9:50 AM

To: Fox, Nelson [USA]; Love, Chip

Cc: Wengrad, Bonnie [USA]; Yun, Erin [USA]; Coltrain, Katrina; Chambers, Carlene; Gee, Jo; Ragon, Derek

Subject: RE: [External] FW: Wilcox Primavera

Importance: High

Good Morning Nelson:

I discussed Wilcox with Katrina Coltrain this morning and she states that she just checked the system and the RI/FS (Combined RI/FS – Operable Unit 01) is the Activity that has planned obligations only (in the Published Folder) and that activity should not be deleted. It is the RI (Remedial Investigation Only) – Operable Unit 01 that is not in Primavera (in the Published Folder), but is in SEMS and that we could not have deleted from SEMS due to financial obligations associated to that record that we cannot see in SEMS.

We would like to ensure that the Combined RI/FS Activity (in the Published) is not the Activity that is deleted and that it is the RI (Remedial Investigation Only) (That you will migrate from the Working Folder and Re-Publish) that is deleted. I attached screenshots below to confirm what you have stated and what Katrina is concerned about.

**So, yes please attempt your suggested approach and let us know immediately of the results.**

Thank you Nelson for all of your help.

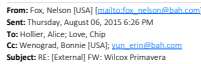
**FY2015 SCAP14 Report – Showing what appears in SEMS Site Management. Both the Combined RI/FS and the RI Activities are in SEMS.**

Category	Sub-category	Site Name	NPL	EE	GOI	Action Type	Name	Lead	Credit	Start	End	SCAP	Status
Non-NPL PRP	Performed	Removal Completions With an Enforceable Instrument											
RI/FS Starts	GOVT Performed												
NPL	RI/FS Starts	GOVT Performed											
WILCOX OIL COMPANY													
JONES ROAD GROUND WATER PLUME													

Funds for the RI/FS Activity are the only funds that we can see in SEMS.

Obligation ID	Program Area	Program Phase	Level 1 Work Package	Financial Action / Fee	Fund Code	Unliquidated Obligations to Date	Expenditures to Date	FY 2013 Open Commitments	FY 2013 Obligations	FY 2013 Obligations + Open Commitments	FY 2013 Portfolio Decision
01	REMEDIATION	Remedial Characterization	GOVT RI/FS	0000	T			\$400,000.00	\$400,000.00	\$400,000.00	\$0.00

Planned Obligations for the RI/FS Activity are the only funds that we can see in SEMS.



As I mentioned on the phone today, the NPL Cleanup initiative will not address the issue below. For the NPL Cleanup Initiative we will be placing NPL activities (Final, Proposed, Deleted, NOID, etc) into their correct work packages so that these activities display correctly on reports and in the data warehouse.

In regards to the issue below, we however did some major investigating. Upon looking in Site Management, there appear to be no actual obligations associated to the Remedial Investigation. We checked the Obligation Planning screen, Compass Exceptions screen, and there is nothing associated to the RI.

However, we checked the site in your working folder and under the Assignments tab for the CERCLIS migrated Remedial Investigation, there appear to be 3 planned obligations listed for this activity. There are three million dollars planned in one million increments which are planned for Jan 31, 2016, Jan 31, 2017, and Jan 31, 2018.

During our efforts for data cleanup in other Regions we support, we have found that if an activity was deleted before planned obligations were dissociated to an activity, then the planned obligations may keep the activity from being deleted in Site Management. To alleviate this issue, we usually migrate the activity back into the published folder and then publish the site. We then would dissociate the planned obligations from the Remedial investigation. We would then delete the activity in Primavera and republish the site. This should alleviate the issue. Would you like for us to try this approach to try to alleviate this issue? Again, I can't guarantee that this will alleviate the issue, but this has worked for other sites in the past and we would be willing to try if you would like.

Please let me know at your earliest convenience.

Thanks!

Nelson Fox

**From:** Hollier, Alice [[mailto:Hollier.Alice@epa.gov](mailto:mailto:Hollier.Alice@epa.gov)]  
**Sent:** Thursday, August 06, 2015 3:14 PM  
**To:** Fox, Nelson [USA]; Love, Chip  
**Subject:** [External] FW: Wilcox Primavera  
**Importance:** High

Hi Nelson:

Scroll down to the email Mrs. Coltrain sent to me on March 24<sup>th</sup> and you'll see where the SEMS Team replied back to Mrs. Coltrain in Red Text stating that the Work Package that I mentioned could not be deleted because there were actual obligations attached. They could not delete this record because of the business rules.

As I stated to you just a moment ago, Katrina wanted to know if these types of problems would be handled in the data cleanup that Chip emailed the regions about a week or so ago and that you just mentioned to me while we were speaking today.

I know that you said that the data cleanup would not cover this, but please send me an email verifying this so that I can deliver this back to Mrs. Coltrain who is the RPM for Wilcox. I delayed in sending this email to Chip because I thought that he was still on vacation and I did not want to bother him.

Welcome back and it was wonderful speaking with you!!

Thank You,

Alice Hollier

**From:** Coltrain, Katrina  
**Sent:** Tuesday, August 04, 2015 7:46 AM  
**To:** Hollier, Alice  
**Subject:** RE: Wilcox Primavera

Alice, as you can see from the SCAP 14 report, this errant RI is showing as a commitment in SEMS under the category **RI/FS Starts (GOVT Performed)**.

Katrina Higgins-Coltrain  
Remedial Project Manager  
US EPA Region 6  
LA/OK/NM Section  
1445 Ross Avenue  
Dallas, Texas 75202  
214-665-8143



**From:** Coltrain, Katrina  
**Sent:** Monday, August 03, 2015 6:53 AM  
**To:** Hollier, Alice  
**Subject:** FW: Wilcox Primavera  
**Importance:** High

Primavera issue with Wilcox.

Katrina Higgins-Coltrain  
Remedial Project Manager  
US EPA Region 6  
LA/OK/NM Section  
1445 Ross Avenue  
Dallas, Texas 75202  
214-665-8143



**From:** Hollier, Alice  
**Sent:** Tuesday, March 24, 2015 9:04 AM  
**To:** Coltrain, Katrina  
**Subject:** RE: Wilcox Primavera  
**Importance:** High

Hi Katrina:

The issue with Wilcox is just as I stated to you last week. Here is the reply from the SEMS Team:

**02/23/2015 5:37:14 PM - SHARLA SHANK**  
SEMS team confirmed if an associated financial is anything other than Planned Obligation (P, nt, finan, trans, type, code = P) such actions cannot be deleted. Therefore, the RI cannot be deleted based on current business rules.

**02/23/2015 2:00:56 PM - SHARLA SHANK**  
We checked the Action table and the activity has been flagged as one that cannot be deleted because it has data associated with it. We see a financial transaction for planned tasking and have asked the SEMS team to check whether this would prevent its deletion.

Thank You,

Alice

**From:** Coltrain, Katrina  
**Sent:** Wednesday, March 18, 2015 2:33 PM  
**To:** Hollier, Alice  
**Subject:** Wilcox Primavera

Alice, please see the discrepancy below. The RI #001WBS is showing up in SEMS but is not in Primavera. This needs to be deleted from the site schedule. I have made revisions in primavera and it has been published at least twice since this section was originally deleted out of SEMS. I did not see funding for this task, and since the RI has not started for this site there should not be any obligated funds for this task. So, I do not know why it continues to show in SEMS.

Thanks

Task Name	Start Date	End Date	Status
Review and Approve Contract/Fed Federal Agency Project Plan and Cost Estimate	4/1/00	10/30/16	Not Started
USMARS 1.1.1.1.1 GOVT Combined RFP	10/27/16	10/27/16	Not Started
USMARS 1.1.1.1.1.1 GOVT Combined RFP (P6)	10/27/16	10/27/16	Not Started
GOVT RFP S Start - Review RFP S Plan	4/1/02	10/27/16	Not Started
GOVT RFP S Start - Obligation of Funds	4/1/02	10/27/16	Not Started
Prepare and Submit RFP S Work Plan	4/1/02	10/27/16	Not Started
Schedule and Forecast Summary GOVT Combined RFP S	4/1/02	10/27/16	Not Started
Update Community Involvement Plan	4/1/02	10/27/16	Not Started
EPA Review and Approve RFP S GOVT and RFP	4/1/02	10/27/16	Not Started
EPA Approves RFP S Work Plan	4/1/02	10/27/16	Not Started
EPA Review and Approve Community Involvement Plan	4/1/02	10/27/16	Not Started
Complete RFP S Final Work	4/1/02	10/27/16	Not Started
Complete Remedial Alternative Screening	4/1/02	10/27/16	Not Started
Develop RFP S Report	4/1/02	10/27/16	Not Started
EPA Approves RFP S Report	4/1/02	10/27/16	Not Started
EPA Approves Final RFP S Report	4/1/02	10/27/16	Not Started
Complete RFP S Report	4/1/02	10/27/16	Not Started

Katrina Higgins-Coltrain  
Remedial Project Manager  
US EPA Region 6  
LA/OK/NM Section  
1445 Ross Avenue  
Dallas, Texas 75202  
214-665-8143